December 16, 2002

Dear Supplier:

CAL-Buy offered a training session on November 22nd specifically for suppliers, which addressed how to read the Purchase Order (Std. 65). Many of you requested the materials be sent because you were unable to attend, and as promised the following are enclosed:

- How to read a Std. 65 - Since the form was changed when we began using the automated system, we want to be sure you understood clearly where to find the information needed to fill the orders. (You will notice the form is condensed. If possible, all information fits onto one page)
- How to identify a CalCard order - CalCard orders can now be placed through CAL-Buy
- How to identify and process a Change Order - This is also known as a revised order
- How to identify and process a Canceled Order

We hope by sharing this information with you that your experience with CAL-Buy will be positive and successful. If you have questions about these documents, please contact Linda Lange at (916) 375-4628.

The other piece of material included in this package is a "Two Question Survey". Please take the time to answer these two questions and return the survey by December 20th. For those of you who receive your CAL-Buy orders by email, you will receive the survey via email and can respond accordingly. All others please return your survey by fax or regular mail. The fax number is (916) 375-4362 and the mailing address is: DGS-Procurement Division - CAL-Buy Unit, 707 3rd St., West Sacramento, CA 95605.

Very truly yours,

Linda Lange
CAL-Buy Training Coordinator and Liaison

LL:ll

Two Question Survey

Your input is very important for the success of CAL-Buy. Please send in the survey as soon as you receive it.

Question: Do you require that the Vendor Part Number appear on the Std. 65 purchase order form? If so, why?   Please indicate if this is a need or a would like to have.

Question: If you currently receive CAL-Buy orders by fax, would you like to switch to email? If so, what is the email address you would like the orders to be sent to?

Please return this survey by one of the following methods:

Email: calbuy@dgs.ca.gov
Fax: (916) 375-4362
Mail: DGS - Procurement Division
Attn: CAL-Buy Unit
707 3rd St., West Sacramento, CA 95605

STATE OF CALIFORNIA CAL-Buy Purchase Order **DO218 (PR75** 1 **DO NOT USE THE DO # AS INVOICE REFERENCE Number use the <u>Agency Order Nu</u> r.** 2	Agency Billing Code **CAL-BUY USE ONLY**	Contract or Delegation Number **CONTRACT # or AGENCY DELEGATION # displays here** 4
SHIP TO: **Address where Items are to be shipped. If there are multiple shipping addresses, they will display after each line item.**	BILL TO: 3 **Address where the invoice is sen**t	Date **Date the order is sent to you by fax or email** 5 Agency Order Number **USE THIS NUMBER FOR INVOICING**

DGS Procurement Division: www.dgs.ca.gov/pd	Information Technology Project Identification Number	
To Supplier Address: 6 **Your Name and Address**	**AGENCY OR BUYER INFORMATION**	Agency Tracking Number (Optional)
	Agency Name **NAME OF ORDERING AGENCY** 7	
	Contact Name **Name of person to contact if you have questions about the order**	
	Contact E-Mail address **Email address of contact person**	
	Contact Phone # **Phone # of contact person**	Contact Fax Number **Fax # of contact person**

Supplier Contact Name **YOUR NAME displays** 8		Supplier Number **YOUR ID # displays here**
Supplier Phone Number **YOUR phone number displays here**	Supplier Fax Number **YOUR fax number here. If it is not correct, notify the buyer on the contract**	Supplier E-Mail Address **YOUR email address here. If it is not correct, notify the buyer on the contract**

Payment Terms 9	☐ Certified Small	Expiration Date	Certification Number	☐ Certified DVBE	Expiration Date	Certification Number
Required Delivery Date 10	SHIPPING INSTRUCTIONS 11	F.O.B. Destination FRT PPD	☐ F.O.B. Destination Ft. PPD/ADD Freight not to exceed cost stated on P.O.	☐ F.O.B. Origin FRT. COLL.		City State Zipcode **City and Zipcode where items are being shipped.**

Recycled Product	Item Number	Quantity	Unit	Commodity Code	Product/Services Description	Unit Price	Extension
CODE displays 12	**Line Item**	**How many ordered**	**How it's packaged**	**CAL-Buy Ref. #**	**Contract #, Description of item**	**Price per unit**	**Total per line item**

Terms and Conditions 13		Taxable Subtotal	**$ Amount of taxable items**
The box selected in this field indicates the terms and conditions to follow. 14	***The dollar amount will be added in these fields if applicable**	Tax Rate Sales Tax	**$ Total Sales Tax**
		*Installation	**Dollar amount displays**
		*Shipping/Freight	**Dollar amount shows here**
		*Other Non-Taxable	**Dollar amount shows here**

Procurement Method (delegation holders only) **The appropriate box will be checked here if this order is** 15 1) **From a Small Business** 2) **Solicited** 3) **Credit Card Purchase (Note: credit card # and information displays. If this box is marked, you need to bill as a credit card purchase.)**	Grand Total	**TOTAL to be billed** 16

Charge Against	Program/Category		Fund Title		(Optional Use)	
	Item	17	Chapter	Statute	Fiscal Year	Object of Expenditure (Code and Title)

CERTIFICATION AND APPROVAL OF EXECUTIVE OFFICER This CAL-Buy purchase order, issued without an original signatuer, constitutes an officially approved prurchase order of the issuing agency. **THIS DOCUMENT IS LEGAL AND BINDING.**	UNENCUMBERED REMAINDER AFTER POSTING THIS ORDER TO ALLOTMENT EXPENDITURE LEDGER		
18	ADJUSTMENT INCREASING ENCUMBERANCES		
State of California Approved Purchase Order	ADJUSTMENT DECREASING ENCUMBRANCES		

For Suppliers: How to Read the CAL-Buy Std. 65
Purchase Order Document

The following describes the main fields you may be interested in. The other fields not recognized are for CAL-Buy buyers only.

1. The DO # is a CAL-Buy reference number only, not to be used for invoicing.
2. Ship To address displays where to ship the goods to. If there are more than one shipping location, the information will display AFTER each line item.
3. Bill to field is the address you send the bill to.
4. Date the order was sent
5. **INVOICE NUMBER. Use this number when referencing invoices.**
6. Your address will display in this field
7. Agency Contact name, Contact Phone # and Fax is here if you have questions about the order
8. Your name, phone number, fax, email and Supplier ID # will appear in these fields
9. Payment terms will display. If not on the form, be sure to look at the terms and conditions on the contract
10. Items to be shipped to location by the specified delivery date
11. Comments may display BEFORE the line items. The comments displayed at this part of the order indicate the comments pertain to the whole order.
12. Items ordered. Displays the recycle product code (for Buyer's use only), Line #, Quantity, Unit of measure on how it's packaged, Commodity Code # (CAL-Buy 12 digit #), Product description, Price per unit, and total price for the line item ordered. More lines will display, depends on how many items are being ordered.
13. Comments may display AFTER the line items. Information will be displayed IF it refers directly to the line item. Example: Specifications may be added.
14. Terms and Conditions are specified here by the box selected.
15. Procurement Method. Be sure to check here if the order is a CalCard order. The CalCard information will display so be sure to bill as a credit card order.
16. Grand Total field: Total to be billed.
17. Charge Against codes are for internal use only
18. Electronic Signature. The statement in this box signifies a legal and binding document and to be treated as a liquid signature.

Informational Cheat Sheet for Suppliers

STATE OF CALIFORNIA
CAL-Buy Purchase Order DO228 (PR771)
STD 65 - CAL-Buy Revision 3/2001
CAL-CARD ORDER

The order that is placed using the CAL-Card (State Credit Card) will have this information display at the top left of the Purchase Order form.

PROCUREMENT METHOD (Delegation holders only)
☐ SMALL BUSINESS (GC 14838.5) ☐ SOLE SOURCE
☐ COMPETITIVE SOLICITATION NUMBER _____

☑ CAL-CARD ORDER
Number: XXXXXXXXXXXX-6666
Exp Date: 01/2004
Name: Mallie

The information you need to gather to charge against is located near the bottom of the form and looks like the above screen shot.

STATE OF CALIFORNIA
CAL-Buy Purchase Order DO167 (PR614)
STD 65 - CAL-Buy Revision 3/2001
CANCELED

If the order has been CANCELED, it will display at the top of the order. Do not fill the order. If you need to speak to the buyer, the contact information is on the form. If you already filled the order, you will need to contact the buyer to arrange a return.

STATE OF CALIFORNIA
CAL-Buy Purchase Order DO197-V2
(PR685-V2)
STD 65 - CAL-Buy Revision 3/2001
CHANGE ORDER

A Change Order is also known as a revised order. DO NOT fill the original order - fill this one instead. You also know it is a change order because the PO# has a -V2 after the order number. If you have any questions on this order, be sure to contact the buyer.